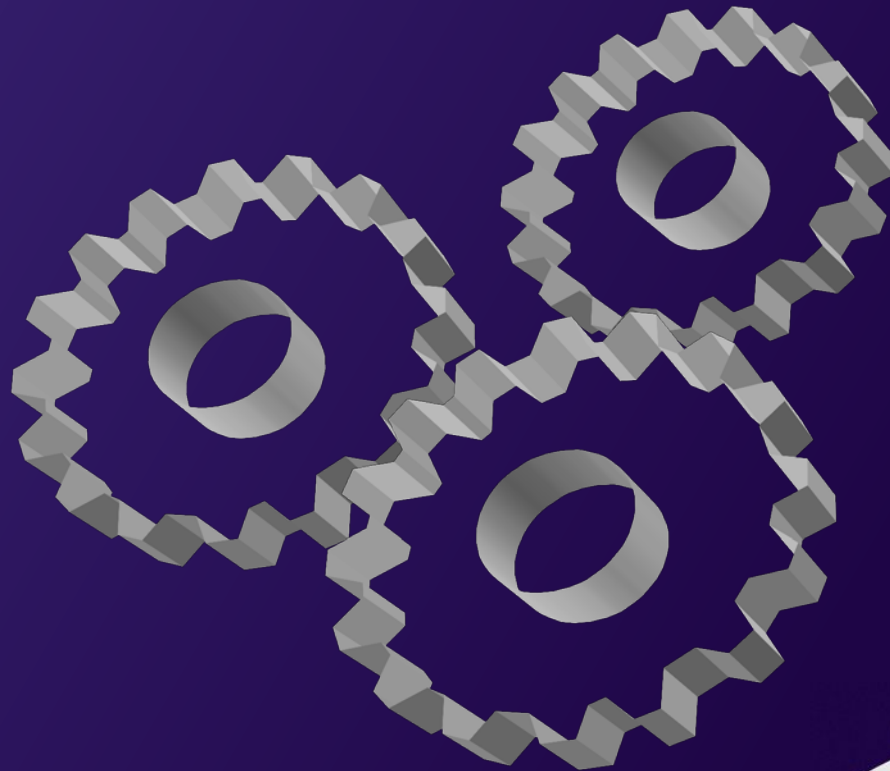


Population Selection 101: Demystifying the Population Selection Process

Session #30062
March 19, 2012



- Mark Jacque
 - Director, Admissions Operations, Technology, and Enrollment Research, University of Baltimore

PeopleSoft/Campus Solutions user since 2001

Functional lead for setup/upgrades on versions 8.0 to 9.0

Functional lead for setup of Oracle (PS) CRM



The University of Baltimore, part of the University System of Maryland, is an urban institution located in the Mount Vernon cultural district of Baltimore City. UB offers more than 50 undergraduate, graduate, and professional degrees and serves a total of 6442 students.



Campus Solutions version 9.0

People Tools 8.51.11

Oracle (PS) CRM 9.1 (Go-Live March 13, 2012, Transfer Dialog)



Overview

- What is population selection?
- How can it be applied in my daily operations?
- Is set up something I can do?



➤ What is population selection?



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➤ What is population selection?

- A delivered tool that leverages PS query
- Can be used as a batch process to run the 3C engine
 - Assign communications
 - Assign checklists
 - Update checklist items
 - Assign comments
- Can also be used to place and release service indicators

➤ What is population selection? Overcome the limitations of Admin Functions

The screenshot displays a software interface for defining triggers. The main window is titled 'Trigger Definition' and contains several sections:

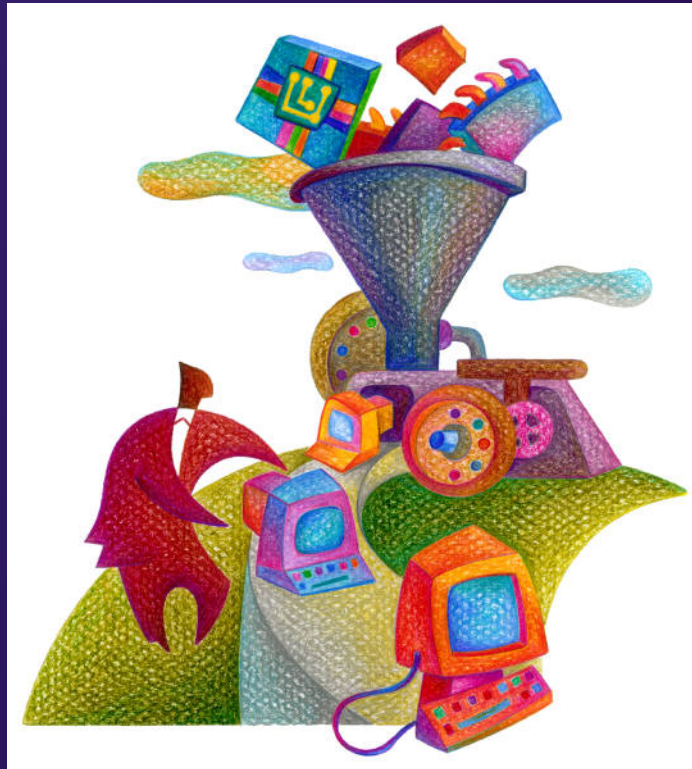
- Trigger Assignment:** Radio buttons for 'System' (selected) and 'Batch Process'.
- Override Parameters:** A checkbox for 'Override' and a text field for 'Override Event ID'.
- Checkboxes:** 'Duplicate Communication Check' and 'Duplicate Checklist Check'.
- Record Level:** A section for 'Event ID'.
- Field Level:** A section for 'Field Combination' (set to 49) and 'Field Conditions'.
- Field Name Selection:** Three search boxes containing 'ACAD_CAREER', 'ACAD_PROG', and 'ADMIT_TERM'.

A 'Look Up' dialog box is open, showing a list of available field names:

Field Name
ACAD_CAREER
ACAD_LOAD_APPR
ACAD_PROG
ACAD_PROG_DUAL
ACTION_DT
ADMIT_TERM
ADM_APPL_NBR
APPL_PROG_NBR
CAMPUS
EFFDT
EFFSEQ
EMPLID
EXP_GRAD_TERM
INSTITUTION
JOINT_PROG_APPR
PROG_ACTION
PROG_REASON
PROG_STATUS
REQ_TERM
STDNT_CAR_NBR

At the bottom of the main window, there are additional search boxes and operators, such as 'PROG_ACTION = APPL'.

➤ How can it be applied to my daily operations?



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IN GENERAL

- Assigning 3Cs to target groups that are too narrowly defined to use the event definition
- Assign checklists to a specific group of students
- Placing and releasing service indicators



SPECIFICALLY

- Assign a communication to a narrowly defined target group

I want to trigger a specific prospect letter to be assigned after I add a code to general evaluations .



SPECIFICALLY

- Assign a checklist when an action is performed on other pages

When Visa/Permit data is added to an applicant's record, a new checklist must be assigned.



SPECIFICALLY

- Placing and release service indicators based on actions performed on other pages

A registration hold is placed on non-degree students to allow continuing degree-seekers to register when classrooms are crowded



➤ Is set up something I can do?



SETUP

- Deciding what it is you are going to do and to whom you will do it
- Writing a population selection query or importing a data set
- Setting up the components of the 3C engine
- Running the appropriate processes



Defining Your Audience

Prospects and applicants with a specific rating scheme on the General Evaluation table

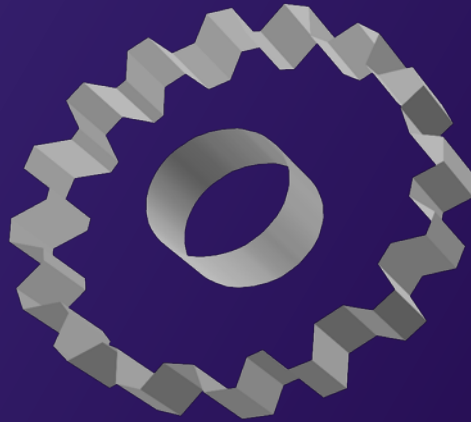
Career = Undergraduate

Rating Scheme = FSPF1

Action = Pre-Award Letter



COMMUNICATION SETUP



COMMUNICATION SETUP

Letter Setup

Favorites | Main Menu > Campus Community > Communications > Set up Communications > **Standard Letter Table CS**

Standard Letters

Letter Code: FY1

*Description: FSP Scholarship 1 Short Description: FSP Schola

Set Letter Code: Recruitment Letters

Processing Letter Details

*Function: Prospect

Applicable to: Persons Organization

*Letter Type: Hardcopy

*Letter Printed Data: All SQC Name:

Joint Communications Allowed

Include Enclosures

Define Comm Gen Parameters

COMMUNICATION SETUP

Communication Context

Navigation: Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Context Table

Communication Context: SCHLRS

Communication Context Description Find | View All | First | 1 of 1 | Last

*Effective Date: 01/01/1901 *Status: Active

*Description: Undergraduate Scholarships

Short Desc: UGRD SCHLR

*Method	*Direction	Letter Code	Description
Letter	Outgoing Communication	F7N	FSP Pre-Award \$7,000 New
Letter	Outgoing Communication	F7R	FSP Pre-Award \$7,000 Revised
Letter	Outgoing Communication	FPT	Freshman Part Time Scholarship
Letter	Outgoing Communication	FY1	FSP Scholarship 1
Letter	Outgoing Communication	FY2	FSP Scholarship 2
Letter	Outgoing Communication	FY3	FSP Scholarship 3
Letter	Outgoing Communication	FY4	FSP Scholarship 4
Letter	Outgoing Communication	FY5	FSP Scholarship 5
Letter	Outgoing Communication	FY6	FSP Scholarship 6
Letter	Outgoing Communication	FY7	FSP Scholarship 7
Letter	Outgoing Communication	FYF	FSP Scholarship F
Letter	Outgoing Communication	NPA	Not Pre-Award Eligible
Letter	Outgoing Communication	TF1	Transfer Scholarship FT 1
Letter	Outgoing Communication	TF2	Transfer Scholarship FT 2
Letter	Outgoing Communication	TF3	Transfer Scholarship FT 3
Letter	Outgoing Communication	TP1	Transfer Scholarship PT 1
Letter	Outgoing Communication	TP2	Transfer Scholarship PT 2
Letter	Outgoing Communication	TP3	Transfer Scholarship PT 3

COMMUNICATION SETUP

Communication Category

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Category Table

Communication Categories

Academic Institution: UBALT University of Baltimore
Communication Category: SCHLPS

Communication Category Description Find | View All First 1 of 1 Last

*Effective Date: 01/01/1901 *Status: Active

*Description: Undergraduate Scholarships

Short Description: UGRD SCHLR

*Function: **PROS** Prospect

*Context	Description
SCHLRS	Undergraduate Scholarships

COMMUNICATION SETUP

3C Group Security

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication 3C Groups

Communication 3C Groups

Institution: UBALT University of Baltimore
Category: SCHLPS Undergraduate Scholarships
Function: Prospect

Update/Inquiry Group

*Group	Description	
ACLS	Admissions Clerical Staff	-
ADAT	Admissions Data Entry Staff	-
APRO	Admissions Professional Staff	-
ASTU	Admissions Student Workers	-

Add

Save **Return to Search** **Notify**

COMMUNICATION SETUP

Speed Key

Home | Add to Favorites | Sign out

Favorites | Main Menu > Campus Community > Communications > Set up Communications > Communication Speed Key Table

New Window | Help | Customize Page | http

Communication Speed Keys

Institution: UBALT University of Baltimore

Function: PROS Prospect

Comm Key Detail Find | View 100 First 9 of 248 Last

*Comm Key: FSPF1 Print Comment

*Description: FSP Scholarship 1 Activity Completed

Short Desc: FSP Schola Unsuccessful Outcome

*Category: SCHLPS Undergraduate Scholarships

*Context: SCHLRS Undergraduate Scholarships

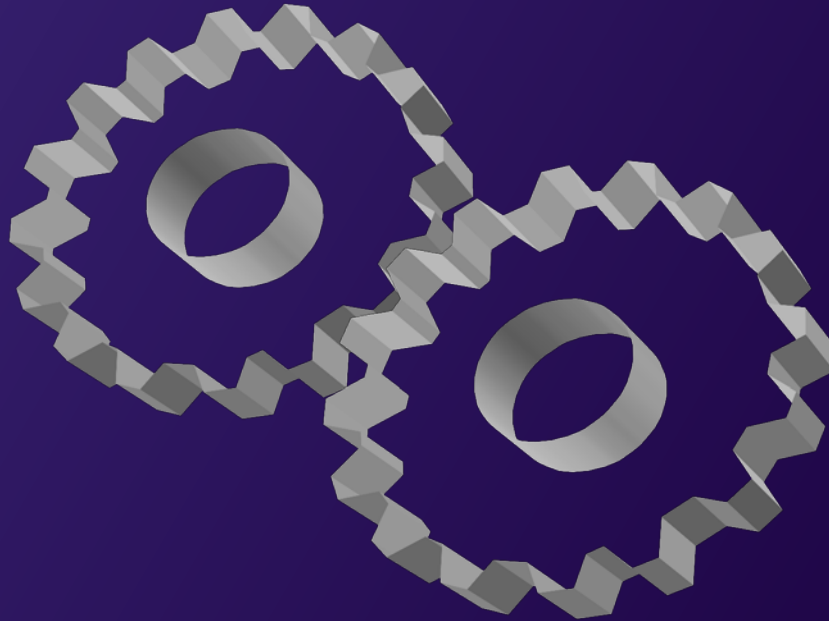
Duration:

*Method: L Letter Direction: OUT Letter Code: FY1

Comments: \$1,000

Save | Return to Search | Notify | Add | Update/Display

BUILDING THE QUERY



BUILDING THE QUERY

Required Tables

Search Results

Record	Customize	Find	View All	First	61-80 of 85	Last
Recname	Join Record	Show Fields				
SCC_PS_ISIR_BND - PopSel Bind record for ISIR	Join Record	Show Fields				
SCC_PS_LOAN_BND - PopSel Bind record for LOAN	Join Record	Show Fields				
SCC_PS_PROP_BND - PopSel Bind record for PROP	Join Record	Show Fields				
SCC_PS_PROS_BND - PopSel Bind record for PROS	Join Record	Show Fields				
SCC_PS_PSSV_BND - PopSel Bind record for PSSV	Join Record	Show Fields				
SCC_PS_RSTR_BND - PopSel Bind record for RSTR	Join Record	Show Fields				
SCC_PS_SFACO_BN - PopSel Bind for SFAC - Orgs	Join Record	Show Fields				
SCC_PS_SFACP_BN - Pop Sel Bind for SFAC - Person	Join Record	Show Fields				
SCC_PS_SFBI_BND - PopSel Bind record for SFBI	Join Record	Show Fields				
SCC_PS_SFCO_BND - PopSel Bind record for SFCO	Join Record	Show Fields				
SCC_PS_SFIT_BND - PopSel Bind record for SFIT	Join Record	Show Fields				
SCC_PS_SFPA_BND - PopSel Bind record for SFPA	Join Record	Show Fields				
SCC_PS_SFRC_BND - PopSel Bind record for SFRC	Join Record	Show Fields				
SCC_PS_SFRF_BND - PopSel Bind record for SFRF	Join Record	Show Fields				
SCC_PS_SFTPO_BN - PopSel Bind for SFTP - Orgs	Join Record	Show Fields				
SCC_PS_SFTPP_BN - PopSel Bind for SFTP - Person	Join Record	Show Fields				
SCC_PS_STRM_BND - PopSel Bind record for STRM	Join Record	Show Fields				

BUILDING THE QUERY

Required Table

Favorites | Main Menu > Reporting Tools > Query > Query Manager

New Window ? Help Customize Page http

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: CS9MJ_FSPF1_POP_SELECT Description: Feed

Working on selection: Top Level of Query Subquery/Union Navigation

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
<input type="checkbox"/>	A ADM_PRSPCT_CAR - Admission Prospect Career	Hierarchy Join <input type="checkbox"/>
<input type="checkbox"/>	B GENL_EVALUATION - General Evaluation	Hierarchy Join <input type="checkbox"/>
<input checked="" type="checkbox"/>	D SCC_PS_PROS_BND - PopSel Bind record for PROS	Hierarchy Join <input type="checkbox"/>

Expand All Records Collapse All Records

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

BUILDING THE QUERY

Variable Data

Favorites | Main Menu > Reporting Tools > Query > Query Manager

New Window ? Help Customize Page http

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name: CS9MJ_FSPF1_POP_SELECT Description: Feed

Working on selection: Top Level of Query Subquery/Union Navigation

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Aqq	Heading Text	Add Criteria	Edit	Delete
1	D.EMPLID - Empl ID	Char11				ID	+	Edit	-
2	D.ACAD_CAREER - Academic Career	Char4		N		Career	+	Edit	-
3	D.INSTITUTION - Academic Institution	Char5				Institution	+	Edit	-
4	D.NAME - Name	Char50				Name	+	Edit	-

Customize | Find | View All | First 1-4 of 4 Last

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

BUILDING THE QUERY

Selection Criteria

Favorites | Main Menu > Reporting Tools > Query > Query Manager

New Window ? Help Customize Page http

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: CS9MJ_FSPF1_POP_SELECT Description: Feed

Working on selection: Top Level of Query [Subquery/Union Navigation](#)

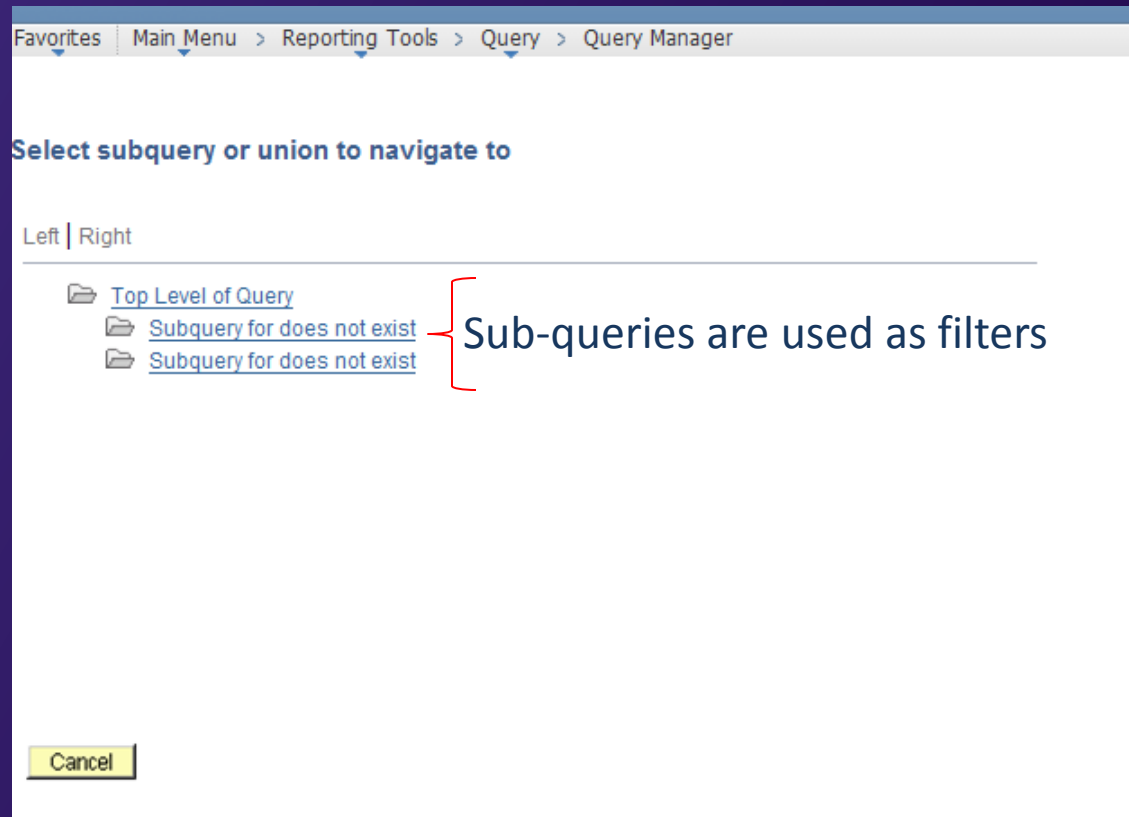
Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EMPLID - Empl ID	equal to	D.EMPLID - Empl ID	Edit	-
AND	A.ACAD_CAREER - Academic Career	equal to	D.ACAD_CAREER - Academic Career	Edit	-
AND	A.INSTITUTION - Academic Institution	equal to	D.INSTITUTION - Academic Institution	Edit	-
AND	A.ACAD_CAREER - Academic Career	equal to	UGRD	Edit	-
AND	A.ADMIT_TERM - Admit Term	greater than	1114	Edit	-
AND	A.EMPLID - Empl ID	equal to	B.EMPLID - Empl ID	Edit	-
AND	B.RATING_SCHEME - Rating Scheme	equal to	FSPF1	Edit	-
AND		does not exist	SUBQUERY	Edit	-
AND		does not exist	SUBQUERY	Edit	-

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

BUILDING THE QUERY

Navigating Through Top Level and Sub-Queries



BUILDING THE QUERY

First Does Not Exist Sub-Query

The screenshot shows a web-based query management tool. At the top, there is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Manager. Below this is a horizontal menu with tabs: Records, Query (selected), Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. The main content area displays the following information:

- Query Name:** CS9MJ_FSPF1_POP_SELECT
- Description:** (empty)
- Working on selection:** Subquery for does not exist
- Feed:** A feed icon and the text "Feed".
- Subquery/Union Navigation:** A link to "Subquery/Union Navigation".
- Instructions:** "Add additional records by clicking the records tab. When finished select a single field for this subquery and you will be transferred to the fields tab."
- Chosen Records:** A table with one row:

Alias	Record
	C COMMUNICATION - Communication Data
- Buttons:** Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, and Return To Search.

BUILDING THE QUERY

Sub-Query Allows A Single Field

The screenshot shows a query editor interface with a top navigation bar containing tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. Below the navigation bar, the Query Name is CS9MJ_FSPF1_POP_SELECT and the Description is empty. The Working on selection is Subquery for does not exist. The interface includes a Feed icon, a Subquery/Union Navigation link, and a Reorder / Sort button. A message states: View field properties, or use field as criteria in query statement. The Fields table is displayed with columns: Col, Field Name, Format, Ord, ALIAS, Agg, Heading Text, Add Criteria, Edit, and Delete. The first row is highlighted with a red oval and contains: 1, C.COMMON_ID - ID, Char11, , , , ID. The interface also includes a Customize | Find | View All | First | 1 of 1 | Last navigation bar and a bottom bar with buttons for Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, and Return To Search.

Col	Field Name	Format	Ord	ALIAS	Agg	Heading Text	Add Criteria	Edit	Delete
1	C.COMMON_ID - ID	Char11				ID		Edit	

BUILDING THE QUERY

Do Not Select If Letter Code Has Been Assigned & Completed

The screenshot shows a web-based query manager interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Manager. Below this, there are navigation tabs: Records, Query, Expressions, Prompts, Fields, Criteria (selected), Having, View SQL, and Run. The main area displays the query name 'CS9MJ_FSPF1_POP_SELECT' and a description 'Subquery for does not exist'. There are buttons for 'Add Criteria', 'Group Criteria', and 'Reorder Criteria'. A table titled 'Criteria' is shown with the following data:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EMPLID - Empl ID	equal to	C.COMMON_ID - ID	Edit	-
AND	C.SCC_LETTER_CD - Letter Code	equal to	FY1	Edit	-
AND	C.COMPLETED_COMM - Communication Completed	equal to	Y	Edit	-

A red circle highlights the two 'AND' rows in the criteria table. At the bottom of the interface, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.

BUILDING THE QUERY

Second Does Not Exist Sub-Query

The screenshot shows a web-based query manager interface. At the top, there is a breadcrumb trail: [Favorites](#) > [Main Menu](#) > [Reporting Tools](#) > [Query](#) > [Query Manager](#). Below this is a navigation bar with tabs: **Records**, [Query](#), [Expressions](#), [Prompts](#), [Fields](#), [Criteria](#), [Having](#), [View SQL](#), and [Run](#). The [Query](#) tab is active.

Query Name: CS9MJ_FSPF1_POP_SELECT Description: [Feed](#) ▼

Working on selection: Subquery for does not exist [Subquery/Union Navigation](#)

Add additional records by clicking the records tab. When finished select a single field for this subquery and you will be transferred to the fields tab.

Chosen Records

Alias Record	
E ADM_APPL_PROG - Admission Applicant Program	Hierarchy Join

Buttons at the bottom: [Save](#), [Save As](#), [New Query](#), [Preferences](#), [Properties](#), [Publish as Feed](#), [New Union](#), and [Return To Search](#).


A red oval highlights the record "E ADM_APPL_PROG - Admission Applicant Program" in the "Chosen Records" list.

BUILDING THE QUERY

Still Selecting in ID field



Favorites Main Menu Reporting Tools Query Query Manager

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name: CS9MJ_FSPF1_POP_SELECT Description:  Feed

Working on selection: Subquery for does not exist [Subquery/Union Navigation](#)

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Col	Record Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	E.EMPLID - Empl ID	Char11				ID		Edit	

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

BUILDING THE QUERY

Do Not Select If Program Action In List Exists

Query Name: CS9MJ_FSPF1_POP_SELECT Description: Feed

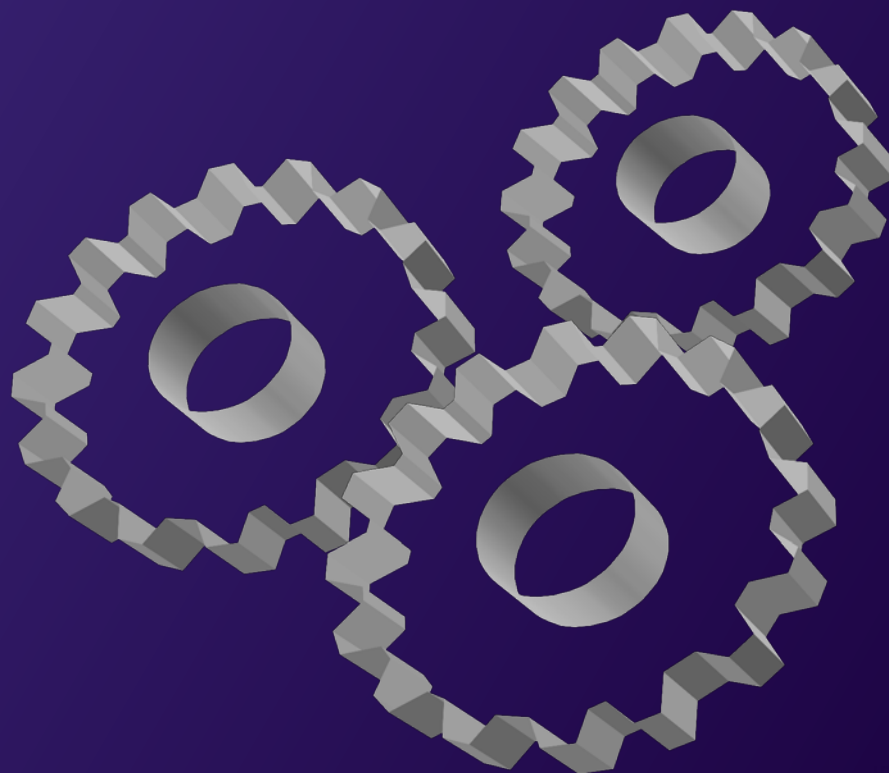
Working on selection: Subquery for does not exist [Subquery/Union Navigation](#)

[Add Criteria](#) [Group Criteria](#) [Reorder Criteria](#)

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	E.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	Edit	-
AND	A.EMPLID - Empl ID	equal to	E.EMPLID - Empl ID	Edit	-
AND	E.ACAD_CAREER - Academic Career	equal to	UCRD	Edit	-
AND	E.PROG_ACTION - Program Action	in list	('ADMT','DENY','COND','PROV','MATTER','WAPP','WADM','DEIN')	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE



PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE

The Event Definition

Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event Definition New Window

Event Definition

Academic Institution: University of Baltimore
Event ID: FSPF1

Event Detail Find | View All First 1 of 1 Last

*Effective Date: 05/26/2010 [st] *Status: Active [v] [+ -]

*Description: FSP Scholarship 1

*Short Description: FSP Sch 1 User Selection

*Function: PROS [q] Prospect [Variable Data Joint Rules](#)

Comm Key

*Comm Key: FSPF1 [q] FSP Scholarship 1 [Detail](#) [+ -]

Comments

*Comment Category: [q] Detail [+ -]

Checklists

*Checklist Code: [q] Detail Update Status [+ -]

Save Return to Search Notify Add Update/Display Include History Correct History

PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE

Assigning 3C Group Security

Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups

Event 3C Groups

Academic Institution: UBALT University of Baltimore

Event ID: FSPF1 FSP Scholarship 1

Function: Prospect

Update/Inquiry Group			
*Group	Description		
ACLS	Admissions Clerical Staff	+	-
ADAT	Admissions Data Entry Staff	+	-
APRO	Admissions Professional Staff	+	-

PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE

Setting Up The Run Control

Favorites | Main Menu > Campus Community > Communications > Run 3C Engine New Window

3C Engine Parameters | Manage Duplicate Assignment

Run Control ID: MJFSPP1 [Report Manager](#) [Process Monitor](#) [Run](#)

Process 3Cs	Process Joint Records
<input checked="" type="checkbox"/> Population Selection <input type="checkbox"/> Trigger Table <input type="checkbox"/> Mass Change	<input checked="" type="radio"/> No <input type="radio"/> Yes, all Joint IDs <input type="radio"/> Yes, if match exists

Event Selection

Academic Institution: UBALT University of Baltimore

Administrative Function: PROS Prospect

Event ID: MJFSPP1 FRSH PROS PREAWARD LETTER [Detail](#)

Communication key
MJFSPP1 FRSH PROS PREAWARD LETTER

Checklist Code

Comment Category

Population Selection

Selection Tool: PS Query

Query Name: CS8MJ_FSPF1_POP_SELECT [Launch Query Manager](#) [Preview Selection Results](#)

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

3C Engine Parameters | [Manage Duplicate Assignment](#)

PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE

Double-Check For Duplicate Communications

Favorites | Main Menu > Campus Community > Communications > Run 3C Engine

3C Engine Parameters | Manage Duplicate Assignment

Run Control ID: MJFSPF1 Report Manager Process Monitor Run

Duplicate Communication Check

Check Duplicate Communication Explain

Additional Conditions to Prevent Duplicate Communication

Variable Data: Match Explain

Communication Status: Explain

Duplicate Checklist Check

Check Duplicate Checklist Explain

Additional Conditions to Prevent Duplicate Checklist

Variable Data: Match Explain

Checklist Status: Explain

Save Return to Search Notify Add Update

3C Engine Parameters | Manage Duplicate Assignment

PUTTING IT ALL TOGETHER TO RUN THE 3C ENGINE Schedule As a Recurring Job

Favorites | Main Menu > Campus Community > Communications > Run 3C Engine New Window

Process Scheduler Request

User ID: UBTU91G95 Run Control ID: MJFSPF1

Server Name: PSNT Run Date: 01/30/2012 31
Recurrence: Daily 10:00PM Run Time: 10:00:00PM Reset to Current Date/Time
Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	3C ENGINE	3CENGINE	Application Engine	Web	TXT	Distribution

OK Cancel

PRODUCING THE FINISHED PRODUCT

Letter Generation

Favorites | Main Menu > Campus Community > Communications > Letter Generation

Run Control ID: MJFSPF1 [Report Manager](#) [Process Monitor](#) [Run](#)

ID Selection

All IDs One Person ID All Person IDs One Org ID All Org IDs

Person ID:

Organization ID:

Letter Code Selection Letter Code: FSP Scholarship 1

Missing Critical Data

Produce Communication

Complete Communication

Name and Address Usage

Address:

Addr Name:

Salutation:

Joint Salutation Usage

Joint Name:

ID Extract Name Usage

ID Extract Name Usage:

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

[General Parameters](#) | [Date/Merge Parameters](#) | [Checklist Parameters](#)

PRODUCING THE FINISHED PRODUCT

Letter Generation Process Scheduler

Selection Criteria

Function 📄 📅 💬

🔍 Variable Data

Category Method Direction Letter Code Status:

🔍 ▾ ▾ 🔍 All ▾ Search

Search Results

General Info Letter Details ▶▶▶

	Process Used	Method	Letter Code	Direction	Function	Assign Date/Time	Date Completed	Sequence
Edit View	LetterGen	Letter	FY1	Outgoing	PROS	12/09/2011 8:45:54AM	12/15/2011	10
Edit View		E-Mail	WIN	Outgoing	PROS	12/07/2011 1:35:23PM		9
Edit View	LetterGen	E-Mail	ID5	Outgoing	PROS	11/08/2011 2:45:46PM	11/08/2011	8
Edit View	LetterGen	Letter	UPR	Outgoing	PROS	11/09/2010 9:32:33AM	11/15/2010	7
Edit View	LetterGen	Letter	UPF	Outgoing	PROS	11/09/2010 9:32:33AM	12/07/2010	6
Edit View	LetterGen	Letter	UPS	Outgoing	PROS	11/09/2010 9:32:33AM	01/03/2011	5
Edit View	LetterGen	Letter	U2L	Outgoing	PROS	11/09/2010 9:32:33AM	11/29/2010	4
Edit View	LetterGen	Letter	ZVT	Outgoing	PROS	10/14/2010 12:20:06PM	01/03/2011	3
Edit View	LetterGen	Letter	ZVB	Outgoing	PROS	10/14/2010 12:20:06PM	10/19/2010	2
Edit View	LetterGen	Letter	ZFA	Outgoing	PROS	10/14/2010 12:20:06PM	11/15/2010	1

PRODUCING THE FINISHED PRODUCT

Letter Generation

«AddrFirstName» «AddrLastName»
«Address1» «Address2»
«City», «State» «Postal»

Dear «AddrFirstName»:

It is my pleasure to inform you of your eligibility to receive a **\$1,000** University of Baltimore merit scholarship at the University of Baltimore for the upcoming academic year. This amount is renewable for each year of study as long as you enroll full-time with 12 or more credits per semester, achieve a GPA of 2.5 or better, and maintain financial aid satisfactory academic progress at the University of Baltimore. Should you decide to enroll part-time, your scholarship will be adjusted to an annual amount of \$500. Your merit scholarship may be funded by a named scholarship account through the UB Foundation. In four years as an undergraduate at UB, you could receive:

Year One	\$1,000
Year Two	\$1,000
Year Three	\$1,000
Year Four	\$1,000
Total Award	\$4,000

This offer is based upon your self-reported academic credentials. You must apply for admission at www.ubalt.edu/apply and be accepted at the University of Baltimore to receive this scholarship. You may also be eligible for additional financial aid based upon demonstrated financial need. We strongly encourage you to complete the Free Application for Federal Student Aid (FAFSA) as soon as possible so that your additional eligibility can be determined. The FAFSA is available at www.fafsa.gov

This scholarship is contingent upon your application and admission to the University of Baltimore. At the time of admission, we will verify your self-reported scores and grade point average. Your scholarship award will become official if you are admitted to the University of Baltimore

Congratulations on your potential award at the University of Baltimore!

ALLIANCE 12

Nashville, TN
March 18 – 21, 2012
Gaylord Opryland & Convention Center

A QUICK OVERVIEW – MASS ASSIGN A SERVICE INDICATOR AND CHECKLIST MANAGEMENT



Defining Your Audience

Non-Degree Graduate students, both continuing and new will have a negative service indicator with registration hold placed on their records.



Defining Your Audience

Query Design

- Main query Table = STDNT_CAR_TERM where
 - Career = GRAD and
 - Program = GND and
 - Term = Prompt



Defining Your Audience

Sub-query for Does Not Exist

- Sub-Query Table = Service Indicator Data where
 - Service Indicator Code = GND



BUILDING THE QUERY

Required Tables

Favorites | Main Menu > Reporting Tools > Query > Query Manager

SCCPU_CARTM_BND - Bind for STDNT_CAR_TERM	Add Record	Show Fields
SCCPU_EADTL_BND - EA Staging - Detail Record	Add Record	Show Fields
SCCPU_EQUTN_BND - Bind for STDNT_EQUTN_VAR	Add Record	Show Fields
SCCPU_FATRM_BND - Bind for STDNT_FA_TERM	Add Record	Show Fields
SCCPU_LNORD_BND - Loan Application Amounts	Add Record	Show Fields
SCCPU_PELOD_BND - Pop Upd Bind for Pell Org Dtl	Add Record	Show Fields
SCCPU_PELOR_BND - Pop Upd Bind for Pell Originatn	Add Record	Show Fields
SCCPU_PERS_BND - Bind for PERS_INST_REL	Add Record	Show Fields
SCCPU_SLCST_BND - Bind for SFA_SLC_STUDENT	Add Record	Show Fields
SCCPU_STDCR_BND - Bind for STDNT_CAREER	Add Record	Show Fields
SCCPU_STDNT_BND - Bind for Population Update	Add Record	Show Fields
SCC_BND_BI_ORG - Pop Selection Bind Record	Add Record	Show Fields
SCC_BND_SRCIND - Pop Selection Bind Record	Add Record	Show Fields
SCC_PS_ADIMA_BND - PopSel Bind record for ADIMA	Add Record	Show Fields
SCC_PS_ADMP_BND - PopSel Bind record for ADMP	Add Record	Show Fields
SCC_PS_AVAK_BND - PopSel Bind record for AVAK	Add Record	Show Fields
SCC_PS_AVIN_BND - PopSel Bind record for AVIN	Add Record	Show Fields
SCC_PS_AVMS_BND - PopSel Bind record for AVMS	Add Record	Show Fields
SCC_PS_AWRD_BND - PopSel Bind record for AWRD	Add Record	Show Fields
SCC_PS_FINA_BND - PopSel Bind record for FINA	Add Record	Show Fields
SCC_PS_GENO_BND - PopSel Bind for GEN - Orgs	Add Record	Show Fields
SCC_PS_GENP_BND - PopSel Bind for GEN Person	Add Record	Show Fields
SCC_PS_IHC_BND - PopSel Bind record for IHC	Add Record	Show Fields
SCC_PS_ISIR_BND - PopSel Bind record for ISIR	Add Record	Show Fields
SCC_PS_LOAN_BND - PopSel Bind record for LOAN	Add Record	Show Fields
SCC_PS_PROP_BND - PopSel Bind record for PROP	Add Record	Show Fields
SCC_PS_PROS_BND - PopSel Bind record for PROS	Add Record	Show Fields
SCC_PS_PSSV_BND - PopSel Bind record for PSSV	Add Record	Show Fields

MASS ASSIGN A SERVICE INDICATOR

Setting up the Service Indicator

Favorites | Main Menu > Set Up SACR > Common Definitions > Service Indicators > Service Indicator Table

Service Indicator Codes | Service Indicator Reasons

Academic Institution: TOWSN Towson University Copy

Service Indicator Code: GND

Service Indicator Details Find | View All First 1 of 1 Last

'Effective Date: 01/01/1902 ³¹ *Status: Active + -

'Description: Grad-Non-Degree Hold

Short Description: GR_NOND

Default Reason: GRNONNon-Degree Registration Hold Set No Default

Attributes

Use with: Person Organization Positive Service Indicator Default Start Term (0000)

Display Deceased Label Display in Self-Service Default Start Date

Service Indicator Impact Find | View All First 1 of 1 Last

'Service Impact: AENR Allow drop only; no add actvty + -

Term Category: Regular

Description: Because of course demand, non-degree student registration will take place after degree-seeking students have registered and will be done on a space available basis.

MASS ASSIGN A SERVICE INDICATOR

Setting up the Service Indicator

Favorites | Main Menu > Set Up SACR > Common Definitions > Service Indicators > Service Indicator Table

[New Window](#) | [Help](#) | [Customize Page](#) |

[Service Indicator Codes](#) | **Service Indicator Reasons**

Academic Institution: TOWSN Towson University

Service Indicator Reasons Find | View All First 1 of 1 Last

Service Indicator Code: GND Grad-Non-Degree Hold + -

Effective Date: 01/01/1902 **Status:** Active **Positive Service Indicator**

Reason Details Find | View All First 1 of 1 Last

***Reason Code:** GRNON **Set As Default** [Secure Display by Role](#) + -

***Description:** Non-Degree Registration Hold

Short Description: GR-NOND

***Department:** 209 ***Reference:** Dept

Position Number:

Description: Because of course demand, non-degree student registration will take place after degree-seeking students have registered and will be done on a space available basis

Save Return to Search Notify

Add Update/Display Include History Correct History

[Service Indicator Codes](#) | [Service Indicator Reasons](#)

MASS ASSIGN A SERVICE INDICATOR

Assigning Security

Favorites | Main Menu > Set Up SACR > Security > Secure Student Administration

Main Menu > Set Up SACR > Security >

Secure Student Administration

Set up general security parameters for Student Administration.

User ID Define and maintain User ID security. <ul style="list-style-type: none">Academic Institution SecurityInstitution/Career SecurityAcademic Program Security14 More...	Permission List Grant and maintain permission lists access. <ul style="list-style-type: none">Enrollment SecuritySelf-Serv Enrollment Perm List	Setup Define security settings. <ul style="list-style-type: none">Enrollment Security TableEnrollment Group AccessUser Security ReplacementUser Profiles Mass Creation
Process Update security. <ul style="list-style-type: none">Security Views UpdateUpdate Security - Acad OrgsUser Profiles ManagementUser Profiles Mgmt - Clean Up		

MASS ASSIGN A SERVICE INDICATOR

Assigning Place and Release Security

Favorites | Main Menu > Set Up SACR > Security > Secure Student Administration > User ID > Service Indicator Security

Service Indicator Security

User ID: JACQUE **Name:** Jacque,Mark F.
Academic Institution: TOWSN Towson University


Security Settings Customize | Find | View 100 | First 31-40 of 108 Last

*Service Indicator Code		*Reason		Placement	Release		
GGR	Grad - Graduation Hold	VERI	Graduation Verification Needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
GIN	Grad International Admissions	DOC	Documents Needed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
GMT	Missing Transcript Non-Degree	OMT	Missing Transcript Non-Degree	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
GND	Grad-Non-Degree Hold	GRNON	Non-Degree Registration Hold	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
GNR	Grad-Non-Degree Release	REL	Non-Degree Hold Release	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

MASS ASSIGN A SERVICE INDICATOR

Mass Assign Run Control

Favorites | Main Menu > Campus Community > Service Indicators > Person > Mass Assign

[New Window](#) | [Help](#) | [Customize Page](#) | 

Mass Assign

Run Control ID: MJ_GR_NOND_REG_HOLD [Report Manager](#) [Process Monitor](#)

Population Selection

Selection Tool: [Edit Prompts](#)
Query Name: TUC89GR_MJ_POP_SEL_NOND_HOLD [Launch Query Manager](#) [Preview Selection Results](#)

Service Indicator Data

*Institution:
*Service Indicator Code: GNR Grad-Non-Degree Release
*Reason: REL Non-Degree Hold Release Use System Date

Effective Period

Start Term: Begin Term - Srvc Indicatr Use End Term:
Start Date: End Date:

Assignment Details

*Department: Towson University
Reference:
Amount: Currency Code: USD Dollar


Contact Information

Contact ID: Contact Person:
Placed Person ID: Placed By:

MASS ASSIGN A SERVICE INDICATOR


Mass Assign Run Control

Favorites | Main Menu > Campus Community > Service Indicators > Person > Mass Assign

[New Window](#) | [Help](#) | [Customize Page](#) | 

Process Scheduler Request

User ID: JACQUE **Run Control ID:** MJ_GR_NOND_REG_HOLD

Server Name: **Run Date:** 

Recurrence: **Run Time:**

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Assign Service Ind	EIPSIASG	PSJob	(None) ▾	(None) ▾	Distribution
<input checked="" type="checkbox"/>	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web ▾	TXT ▾	Distribution

Defining Your Audience

New international graduate students who are at the beginning of the application process who need a unique international student checklist.



MASS ASSIGN A CHECKLIST

Checklist Code: GINT Graduate International Student

Detail Find | View All First 1 of 1 Last

***Effective Date:** 10/10/2003 ***Status:** Active

***Description:** Graduate International Student Display in Self Service

Short Description: Grad Int'l **Due Days:** 1

***Function:** ADMA Admissions Application **Due Date:**

Checklist Type: Requirements List **Tracking Group:**

Item List Customize | Find | First 1-4 of 4 Last

*Sequence	*Item Code	Description	Default Due Date	Due Days	Comm Key		
100	CRDEVL	Cred Eval		1		+	-
300	TOEFL	TOEFL		1		+	-
400	ISIFRM	ISI Form		1		+	-
500	GFIN	Finan Docs		1		+	-

MASS ASSIGN A CHECKLIST The Query

The screenshot shows a web-based query management tool. At the top, there are navigation tabs: Records, Query (selected), Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. To the right, there are links for New Window, Help, and Customize Page. Below the tabs, the Query Name is TUCS9GR_MJ_POP_SEL_CHK_INTL and the Description is POP SELECT FOR INTL CHECKLIST. A 'Feed' icon is also present. The 'Working on selection' section indicates 'Top Level of Query' and provides instructions on how to manage records and fields. Below this is a 'Chosen Records' section with a table of records. The first record, 'A SCC_PS_ADMA_BND - PopSel Bind record for ADMA', is circled in red. Other records include 'B ADM_APPL_DATA - Admission Application Data', 'C ADM_APPL_PROG - Admission Applicant Program joined with B', and 'E VISA_PMT_DATA - EE/Dependent Visa Data'. At the bottom, there are buttons for 'Expand All Records' and 'Collapse All Records', and a row of links: Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, and Return To Search.

Records | **Query** | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

New Window | Help | Customize Page

Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL Description: POP SELECT FOR INTL CHECKLIST Feed

Working on selection: Top Level of Query Subquery/Union Navigation

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
	A SCC_PS_ADMA_BND - PopSel Bind record for ADMA	Hierarchy Join
	B ADM_APPL_DATA - Admission Application Data	Hierarchy Join
	C ADM_APPL_PROG - Admission Applicant Program joined with B	Hierarchy Join
	E VISA_PMT_DATA - EE/Dependent Visa Data	Hierarchy Join

Expand All Records Collapse All Records

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

MASS ASSIGN A CHECKLIST

The Query Setting up a Prompt

New Window | Help | Customize Page

Records | Query | Expressions | **Prompts** | Fields | Criteria | Having | View SQL | Run

Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL **Description:** POP SELECT FOR INTL CHECKLIST Feed ▾

Working on selection: Top Level of Query [Subquery/Union Navigation](#)

[Add Prompt](#)

Prompt	Edit	Delete
:1 = ADMIT_TERM - Admit Term	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

MASS ASSIGN A CHECKLIST

Variable Data for ADMP

[New Window](#) | [Help](#) | [Customize Page](#)

[Records](#) | [Query](#) | [Expressions](#) | [Prompts](#) | **[Fields](#)** | [Criteria](#) | [Having](#) | [View SQL](#) | [Run](#)

Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL **Main Content:** POP SELECT FOR INTL CHECKLIST [Feed](#)

Working on selection: Top Level of Query [Subquery/Union Navigation](#)

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Fields										
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete	
1	A.EMPLID - Empl ID	Char11				ID		Edit	-	
2	B.ACAD_CAREER - Academic Career	Char4				Career		Edit	-	
3	B.STDNT_CAR_NBR - Student Career Nbr	Num3.0				Career Nbr		Edit	-	
4	B.ADM_APPL_NBR - Application Nbr	Char8				Appl Nbr		Edit	-	
5	B.INSTITUTION - Academic Institution	Char5				Institution		Edit	-	

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

MASS ASSIGN A CHECKLIST

Selection Criteria

[Favorites](#) | [Main Menu](#) > [Reporting Tools](#) > [Query](#) > [Query Manager](#)

[Customize](#) | [Find](#) | | | First | 1-16 of 16 | Last

Criteria	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text"/>	A.EMPLID - Empl ID	equal to	B.EMPLID - Empl ID	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.ACAD_CAREER - Academic Career	equal to	B.ACAD_CAREER - Academic Career	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.STDNT_CAR_NBR - Student Career Nbr	equal to	B.STDNT_CAR_NBR - Student Career Nbr	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.ADM_APPL_NBR - Application Nbr	equal to	B.ADM_APPL_NBR - Application Nbr	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.INSTITUTION - Academic Institution	equal to	B.INSTITUTION - Academic Institution	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	C.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.ACAD_CAREER - Academic Career	equal to	GRAD	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	C.PROG_ACTION - Program Action	equal to	APPL	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	C.ADMIT_TERM - Admit Term	greater than	:1	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	C.ACAD_PROG - Academic Program	not equal to	GND	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	A.EMPLID - Empl ID	equal to	E.EMPLID - Empl ID	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	E.EFFDT - Effective Date	Eff Date <=	Current Date	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>	(E.VISA_PERMIT_TYPE - Visa/Permit Type	like	F%	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="OR"/>	E.VISA_PERMIT_TYPE - Visa/Permit Type	like	H%	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="OR"/>	E.VISA_PERMIT_TYPE - Visa/Permit Type	like	J%)	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
<input type="text" value="AND"/>		does not exist	SUBQUERY	<input type="button" value="Edit"/>	<input type="button" value="[-"/>

MASS ASSIGN A CHECKLIST Sub-query for Does Not Exist

[New Window](#) | [Help](#) | [Customize Page](#)

Records | **Query** | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL **Description:** POP SELECT FOR INTL CHECKLIST Feed ▾

Working on selection: Subquery for does not exist [Subquery/Union Navigation](#)

Add additional records by clicking the records tab. When finished select a single field for this subquery and you will be transferred to the fields tab.

Chosen Records

Alias	Record
	D PERSON_CHECKLST - Person Checklist

[Hierarchy Join](#)


Save | [Save As](#) | [New Query](#) | [Preferences](#) | [Properties](#) | [Publish as Feed](#) | [New Union](#) | **Return To Search**

MASS ASSIGN A CHECKLIST

Sub-query Logic for Does Not Exist

[New Window](#) | [Help](#) | [Customize Page](#)

Records | Query | Expressions | Prompts | Fields | **Criteria** | Having | View SQL | Run

Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL **Description:** POP SELECT FOR INTL CHECKLIST  [Feed](#) ▾

Working on selection: Subquery for does not exist [Subquery/Union Navigation](#)

[Add Criteria](#) [Group Criteria](#) [Reorder Criteria](#)

Criteria					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text"/>	A.EMPLID - Empl ID	equal to	D.COMMON_ID - ID	Edit	-
AND	D.CHECKLIST_CD - Checklist Code	equal to	GINT	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

MASS ASSIGN A CHECKLIST

The Event Definition

Event ID: GRINTLAPP

Event Detail Find | View All First 1 of 1 Last

*Effective Date: 03/16/2009 + -

*Status: Active + -

*Description: Grad International Application

*Short Description: Gr Intl Ap User Selection

*Function: ADMA Admissions Application [Variable Data Joint Rules](#)

Communications

*Comm Key: + -

Comments

*Comment Category: + -

Checklists

*Checklist Code: GINT Graduate International Student [Detail](#) Update Status + -

*Seg	*Item Code	Description	Responsible ID	*Item Status	Due Date	Due Days	Comm Key		
100	CRDEVL	Cred Eval	0148353	Initiated		1			
200	INTLTR	Intl Tran	0148353	Initiated		1			
300	TOEFL	TOEFL	0148353	Initiated		1			
400	ISIFRM	ISI Form	0148353	Initiated		1			

MASS ASSIGN A CHECKLIST

Remember 3C Group Security

Favorites | Main Menu > Campus Community > 3C Engine > Set Up 3C Engine > Event 3C Groups




Event 3C Groups

Academic Institution: TOWSN Towson University

Event ID: GRINTLAPP Grad International Application

Function: Admissions Application

Update/Inquiry Group

*Group	Description		
GRAD 	Graduate School Staff		

MASS ASSIGN A CHECKLIST

Running the 3C Engine

Favorites | Main Menu > Campus Community > Checklists > Run 3C Engine

Process 3Cs
 Population Selection
 Trigger Table
 Mass Change

Process Joint Records
 No
 Yes, all Joint IDs
 Yes, if match exists

Event Selection
Academic Institution: TOWNSN Towson University
Administrative Function: ADMA Admissions Application
Event ID: GRGINT Grad - International Applicati [Detail](#)

Communication Key

Checklist Code
GINT Graduate International Student
▼ **Checklist Item**

100	CRDEVL	Credential Evaluation
300	TOEFL	Test of Engl as a Foreign Lang
400	ISIFRM	Int'l Student Information Form
500	GFIN	Grad - Financial Documents

Comment Category

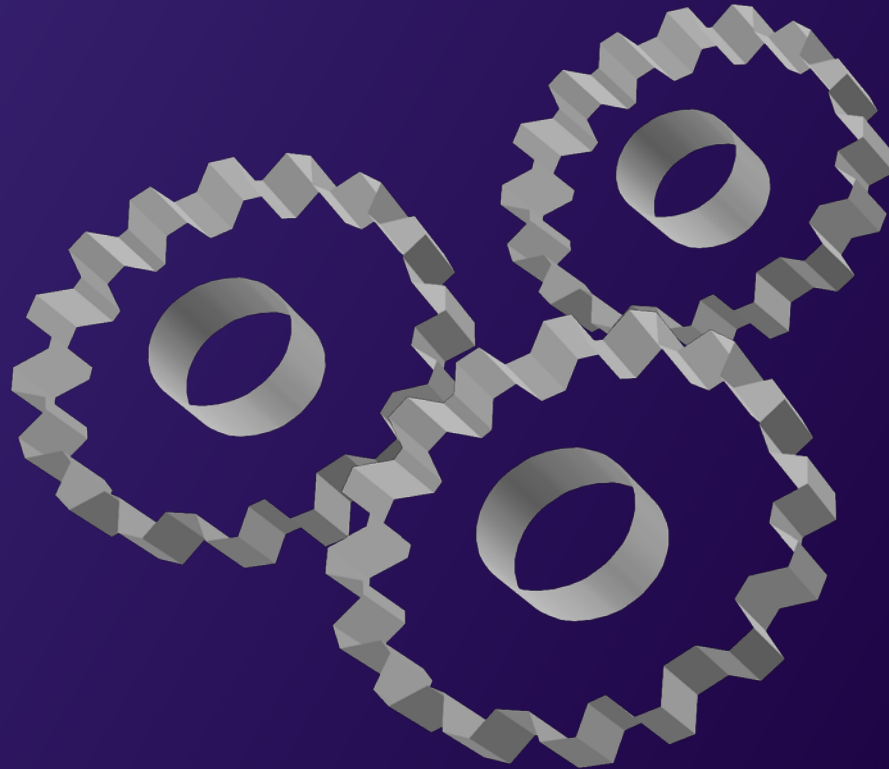
Population Selection
Selection Tool: PS Query [Edit Prompts](#)
Query Name: TUCS9GR_MJ_POP_SEL_CHK_INTL [Launch Query Manager](#) [Preview Selection Results](#)

THE BEAUTY OF POP SELECT

- Extremely versatile
- If you can query it, you can probably control it
- Performs some of the more routine functions
- And can perform those functions for hundreds of records at a time
- You can turn things, especially service indicators, on and off at will
- Frees staff up to work on other, more production tasks



QUESTIONS?



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